GENERATING LARGE UNIT STAFFS DURING WARTIME MOBILIZATION

A Monograph

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This monograph examines building large unit staffs to include divisions, corps, and field armies during mass mobilization. Unlike generating company grade officers, creating leaders capable of operational art is more challenging under tight time constraints. To discover trends on how the Army has generated large unit staffs before, the monograph uses three historical periods, each beginning with a force size contraction and ending with the conclusion of a wartime mobilization. The findings include three key deductions that helped generate or expand large unit staffs including doctrine, officer education, and officer selection. First, doctrine allowed a common point of reference for staff officers to learn and bridge gaps in experience. Next, officer education was critical prior to and during war because an educated officer corps served as the primary trainers to new units preparing for deployment. Finally, successful units had commanders take an active role in identification and selection of personnel capable of adaptive and creative learning. Officers in large unit staffs required many intangible attributes that are difficult to screen based on paper qualifications alone.

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ABSTRACT

GENERATING LARGE UNIT STAFFS DURING WARTIME MOBILIZATION, by Major Erik S. Peterson, 46 pages.

This monograph examines building large unit staffs to include divisions, corps, and field armies during mass mobilization. Unlike generating company grade officers, creating leaders capable of operational art is more challenging with tight time constraints. To discover trends on how the Army has generated large unit staffs before, the monograph uses three historical periods, each beginning with a force size contraction and ending with the conclusion of a wartime mobilization. The first period starts with the United States Army after the War of 1812 and ends with the Mexican American War. The second period is the Army following the Civil War to the Spanish-American War. The final period is the aftermath of World War I to World War II. While distinct, the three periods revealed the evolution of expeditionary staff structures, the role of doctrine, force generation, training, and professional education.

The findings include three key deductions including doctrine, officer education, and officer selection that helped generate or expand large unit staffs. To begin, doctrine allowed a common point of reference for staff officers to learn and bridges gaps in experience. When the Army grew, officers found themselves in unfamiliar positions and echelons. Doctrine provided a framework, facilitated learning, and afforded a common lexicon. Next, officer education was critical prior to and during war. When staffs expanded due to war, an educated officer corps served as the primary trainers to the unit that was also preparing for a deployment. In addition, education increasingly played a role in maintaining proficiency in maneuvering large units when none existed. Finally, successful units had commanders take an active role in identification and selection of personnel capable of adaptive and creative learning. Officers in large unit staffs required many intangible attributes that are difficult to screen based on paper qualifications alone.

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ACRONYMS

MG	Major General
CGSC	U.S. Army Command and General Staff College
GHQ	Ground Headquarters
AD	Armored Division
ID	Infantry Division
ADP	Army Doctrinal Publication
ADRP	Army Doctrinal Reference Publication
FM	Field Manual
TTP	Tactic, Technique, and Procedure

INTRODUCTION

The Staff and Operational Risk With Smaller Operating and Generating Forces

In 2007, the United States Army was short 3,000 majors and senior captains.[1] Transition teams and the move to modular brigade combat teams increased requirements for majors, but demand would also come from expanded sizes of operational headquarters in Iraq and Afghanistan. To generate more majors, the Army decreased promotion time and increased the selection rate.[2] The approach solved the immediate concern of finding field grade officers, but if another sustained strategic threat occurred during the same time, finding qualified officers capable of understanding operational art in a large unit staff would be difficult. Today, Operation Iraqi Freedom has concluded and a diminished presence in Afghanistan will return the Army to a peacetime role.

The 2013 Army Strategic Planning Guidance recognizes four focus areas to include "Commitment to the current fight through successful termination, downsizing the force, adapting to the new security environment, and meeting the requirements of the new Defense strategic guidance."[3] This guidance bears similarities to 1812 or many other points in America's history. It describes ending a war, assessing new security objectives, and building a new force structure for that perceived threat. The guidance also says, "The Army must preserve options for the future by retaining the capacity to expand and provide the capabilities needed for future challenges."[4] Leaders face decisions on balancing the right mix of present capabilities while maintaining some type of generating force for military expansion with no perfect formula to provide an answer.

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[1] Charles A. Henning, *Army Officer Shortages: Background and Issues for Congress*, by Charles A. Henning., CRS Report RL33518 (Washington, DC: Office of Congressional Information and Publishing, July 5, 2006), 1.

[2] Ibid., 8-10.

[3] Department of the Army, *Army Strategic Planning Guidance* (Washington, DC: Government Printing Office, 2013), 2.

[4] Ibid.

In war, mobilization is a difficult yet critical task. Generating combat power quickly can provide a relative numerical advantage that translates into momentum, but this momentum might be temporary as the opposition is working concurrently to gain the same type of advantage. During the race, a critical nerve center includes corps or division staffs who prepare newly built units and then employ them in a new theater. During this process, the staff plays an essential role by providing both situational understanding and control helping a commander to shape the battlefield. At the same time, these corps and division staffs also expand with officers often lacking experience in their new positions. When efficiency needs to be at a peak, those responsible for operational synchronization and planning are still learning. Due to these difficulties, it is important to understand how to mitigate the effects of expansion on the staff and what conditions today can be set that enable time saving expansion.

Literature Review

In general, the literature tends to discuss mobilization and organization of Army staffs as two separate issues. The first group looks at mobilization in terms of personnel, whether it is by drafts, volunteers, or even generating new officers. These authors include Edward S. Johnson in *Building an Army*, John Chambers in *To Raise and Army*, and William B. Skelton in *An American Profession of Arms: The Army Officer Corps, 1784-1861*.[5] The personnel side provides in depth exploration of where to find people, but does not cover how to find competent operational staff officers. The second group includes writers attempting to establish the historical necessity and organization of staff systems in time of war. Writings include Winfield Scott in *General Regulations for the Army* published in 1821, Emory Upton in the *Military Policy of the United States*, and J.D. Hittle in *The*

[5] Edward S. Johnson, *Building an Army: Mobilization of Manpower in the Army of the United States* (Harrisburg, PA: The Military Service Publishing C0., 1941), 77; John W. Chambers, *To Raise and Army: The Draft Comes to Modern America* (New York: The Free Press, 1987), 5-9; William B. Skelton, *An American Profession of Arms: The Army Officer Corps, 1784-1861* (Lawrence: University of Kansas Press, 1992), 222-229.

Military Staff.[6] The organization group is able to envision what the staff should look like and how it should function, but falls short in translating how to expand as an effective operational staff during mobilization. In summary, there is a significant quantity of research on many facets of mobilization and analysis on staffs but very little specific research into what worked or failed when large unit staffs formed quickly.

Methodology

This study analyzes three historical periods, each beginning with force size contraction and ends with the conclusion of wartime mobilization. The first period starts with the United States Army after the War of 1812 and ends with the Mexican American War. The second period is the U.S. Army following the Civil War to the Spanish-American War. The final period is the aftermath of World War I and includes mobilization through World War II.

Following the analysis of each period, the monograph identifies common trends in doctrine, personnel management, and training that influenced expanding the staff system. Next, the study evaluates the concepts against two screening criteria in order to be viable implications to the force. First, the concept must be suitable, feasible, and acceptable for implementation today. There are ideas that may be incongruent with the current environment, modern American culture, or present day strategic and military aims. The second criterion examines if there are significant costs to current doctrine, organization, and personnel. Changes to support a future war should not noticeably affect readiness today. From this screening, the monograph offers potential implications for the modern force.

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[6] Department of the Army, *General Regulations for the Army* (Philadelphia: M. Carey and Sons, 1821), 60-61, 89-90; Emory Upton, *Military History of the United States* (Washington, D.C.: Government Printing Office, 1904), xiii-xiv; James Hittle, *The Military Staff: Its History and Development* (Harrisburg, PA: Stackpole, 1975), 185-186.

Thesis

Doctrine, education, and personnel selection are key components for generating new staffs capable of facilitating command and control at the division level and higher. Historically, large formation staffs integrating doctrine and training while selecting the right personnel deployed faster and performed more efficiently in combat. To begin, doctrine allows a common point of reference for staff officers to learn and bridges gaps in experience. Next, training in both organizational and institutional settings allows new officers to build technical tools and envision how to arrange tactical actions in time, space, and purpose. Finally, officers in large unit staffs working in operational art require skillsets that cannot be learned though rote memory and drill. Therefore, it is important to identify and select personnel capable of adaptive and creative learning.

SECTION II: THE MEXICAN AMERICAN WAR

At the conclusion of the War of 1812, the Army's personnel authorization was 62,274.[7] It was time for Americans to reassess the size of a peacetime Army, and although major combat operations ceased, the United States still had credible security threats in the region. British troop presence remained north of the American border in Canada, the Spanish seemed unable to control their territory in the south, and Indians threatened the frontier.[8] Despite recommendations for a 20,000-soldier force, Congress cut the Army to 6,183 in March 1821 and selected a fixed number of regiments to remain in active service.[9] Over the next twenty-five years, the Army would grow to 8,619 officers and enlisted which would form the base of expansion for the Mexican-American War.[10] The Army was a frontier force primarily operating in small units. Expansion then took place from 1846-1848 with 73,532 soldiers serving in the Army overall and 50,000 on duty at any single point in time.[11] The new conflict vastly increased the size and concentration of the force, creating a requirement for multiple division and field army staffs that did not previously exist.

Formalizing the Staff Organization

In addition to debating what the Army size should be, there was further debate on the organization and capabilities required. In the early nineteenth century, Napoleonic warfare introduced the use of the division and corps, requiring both experienced commanders and supporting

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[7] Russell F. Weigley, *History of the United States Army* (Bloomington: Indiana University Press, 1984), 121.

[8] Ibid.

[9] Allan Millett, Peter Maslowski, and William Feis, *For the Common Defense: A Military History of the United States of America from the Revolutionary War through Today, Rev. and expanded.* (New York: Free Press, 2012), 113.

[10] Weigley, *History of the United States Army*, 182.

[11] Ibid, 183.

staff systems. In contrast, the American Army lacked a formal staff at any level. Thirty-five year old John C. Calhoun became the secretary of war in 1817 and quickly grasped "if [the American Army] is neglected in peace when there is leisure, it will be impossible, in the midst of the hurry and bustle of war to bring it to perfection."[12] Calhoun understood that building an army took time and it was easier to build a staff in peacetime than it would be in war. Therefore, Calhoun proposed a new plan that would support rapid expansion with experienced soldiers.

As part of the expansible army concept, Calhoun wrote that when the army transitioned from peace to war it also required a competent trained command and staff system to handle the complexities of the transition.[13] Calhoun was aware that moving from peace to war has many intricate interrelated variables and maintaining an organization prepared to deal with problems was an advantage in war. The plan proposed that the Army should maintain army units with their commanders and associated staff for field armies capable of both integrating new soldiers and preparing for operations when war came.[14] In addition to war, a headquarters would also serve as a generating force, forming and training new units while conducting operational planning.

In March 1821, Congress rejected Calhoun's proposal and additionally reduced the Army to 6,183.[15] American society had different views on the size and purpose of a peacetime military. At the same time, Congress authorized a General Staff with bureaus specialized in carrying out

[12] Weigley, *History of the United States Army,* 134.

[13] John C. Calhoun, "Reduction of the Army: Communicated to the House of Representatives December 12, 1820," in *American Military Thought*, ed. Walter Mills (Indianapolis, IN: Bobbs-Merrill Company, 1966), 93-95.

[14] Ibid.

[15] Millett, *For the Common Defense: A Military History of the United States of America from the Revolutionary War through Today, Rev. and expanded*, 113.

administrative affairs across the Army.[16] The congressional authorization was important because the concept of having a staff was now legitimate. The staff system from the Revolutionary War to the War of 1812 had no continuity, formed from scratch at the start of each war, and disbanded after war was over.[17] The Army could now develop regulations and doctrine for the staff between wars. Finally, Calhoun's core model to use a commander and a supporting staff to generate new forces and then deploy to fight would last through World War II.

The Staff Organization

The 1821 General Staff included eight centralized administrative bureaus.[18] If war occurred, bureaus were responsible for sending field representatives to field, corps, and division level commands to form a staff. Each bureau was responsible for selection, staffing, and training their representatives.[19] Conceptually a field army commander or below would receive a trained, fully filled staff tailored to the operational environment, the only thing a commander would need to do was synchronize his staff.

Despite the simplicity of the system, the field commander lacked traditional command authority over the staff. The bureau representatives officially reported to the bureau with evaluations and promotions coming from the bureau as well.[20] Another challenge was bureau staff officers were primarily administrators and not tactical or operational maneuver planners.[21] Hence, if the

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[16] Millett, *For the Common Defense: A Military History of the United States of America from the Revolutionary War through Today, Rev. and expanded*, 134-135.

[17] Weigley, *History of the United States Army,* 134-135.

[18] Wayne Wei-siang Hsieh, *West Pointers and the Civil War* (Chapel Hill, NC: The University of North Carolina Press, 2009, 28-31.

[19] Ibid., 28-31.

[20] Hittle, *The Military Staff: Its History and Development*, 185-186.

[21] Ibid., 186-187

commander needed supplies, it was not the responsibility of the quartermaster to forecast the requirement; the quartermaster was only there to fill the request. Therefore, there were some constraints on what a commander could do and personalities would be very important to make the system work.

The Introduction of Doctrine for the Staff

While written materials appeared earlier in the Army, it was not until the 1820s that any staff doctrine evolved. Key in development was General Winfield Scott. Scott toured Europe, personally observed European staffs, read contemporary books on military administration, and started thinking about how to improve the American Army.[22] In his research, Scott detected a major difference between the American and European models. The design of the American staff system focused on logistics and administration, whereas existing European staffs focused on planning and fighting.[23] While Scott could not force congress to legislate changes in American staff organization, lessons from the European staffs would serve as the basis for the first Army regulations.

The 1821 *General Regulations of the Army* officially established roles and functions for the staff. While this regulation dealt with all facets of soldiering, a considerable portion directly dealt with the staff by providing instructions on how staff operations should occur. There was no staff school for the Army, nor unit training exercises for a staff, so all facets of the American staff processes were in one book. The 1821 regulation was the only formal Army point of reference for staff familiarity and synchronization.

The regulation established a district commander who was to receive an appropriate amount of staff officers from the bureaus based on field requirements.[24] This was the formal directive making

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[22] Hsieh, *West Pointers and the Civil War*, 28.

[23] Ibid.

[24] Department of the Army, *General Regulations for the Army 1821* (Philadelphia, PA: M. Carey and Sons, 1821), 60-61. Article 38 covers the requirement for Bureau chiefs to supply

the conceptual idea to fill a staff with specialized bureau officers from the General Staff to a field army headquarters an order. Next, the "Theory of the Staff" articulated that staff officers functioned as a battlefield communicator for the commander.[25] In practice, the communication role was not limited to serving as physical information nodes. The purpose of the staff was to help a commander understand the environment and then communicate orders to subordinates, which is similar to the modern Army operations process.[26] Hence, an 1821 staff had a rudimentary analysis role to help a commander develop situational understanding.

The regulation also established two types of duties for the staff. First, there were sedentary duties such as publishing orders and tracking the state and disposition of subordinates.[27] Essentially, the staff was responsible for battle tracking. Second, there were active duties such as establishing camps, conducting reconnaissance, and any function exterior to a bureau function.[28] The second directive provided a commander the ability to build a fighting operational staff alongside the administrative staff based on the specific environment. While not explicit, an American commander could build a planning and fighting staff if the situation needed one.

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representatives. There is no definition of what an appropriate number of officers are, but the regulation is specific that if a field commander makes a request for a service, such as supplies, the bureau is responsible for obtaining them.

[25] Department of the Army, *General Regulations for the Army 1821*, 89-90. Article 45 covered the "Theory of the Staff."

[26] Ibid. Article 45 covered the "Theory of the Staff." Department of the Army, ADRP 5-0 *The Operations Process* (Washington D.C: Government Printing Office, 2012), 1-2. Commander activities are visualize, describe, direct, understand, lead, and assess to achieve mission accomplishment. Furthermore, "The staff's role is to assist commanders with understanding situations, making and implementing decisions, controlling operations, and assessing progress. In addition, the staff assists subordinate units (commanders and staffs), and keeps units and organizations outside the headquarters informed throughout the conduct of operations," 1-2.

[27] Ibid. Article 45 outlines the powers of the chief of staff.

[28] Ibid.

Finally, to empower the chief of staff, Articles 66-73 mandated specific field responsibilities for the bureau staff officers. The 1821 regulation dedicated 147 of 355 pages with specific bureau responsibilities, planning guidelines, and request forms.[29] While friction between bureau staff officers and units could exist, clear rules allowed the chief of staff to synchronize responsibilities. In summary, the 1821 field regulation provided the authority for a field army commander to build and control a staff.

Expansion for War

Except for a few minor modifications, Army staff regulations and practice would change little for the next twenty-five years. In 1846, when the Army began expanding for the Mexican American War, the first requirement for a field army and subordinate division staffs was born. To build the staff, Major General Zachary Taylor ordered two officers from each subordinate unit to join him.[30] Divisions looked for officers as well, but also attempted to find talent. For instance, Lieutenant John Pemberton joined Brevet Brigadier General William Worth's staff in August 1846 after valorous fighting in the Battle of Palo Alto.[31] In general, commanders built their staffs by finding capable officers in their line units who excelled in their normal assigned duties.

Next, the challenge for the new staffs was to figure out how to synchronize operations. For example, when the Northern Mexico campaign commenced, the Army was significantly short wagons to move supplies.[32] This was because the staff did not have situational awareness of what size force

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[29] Ibid, 162-309.

[30] *Surrounded by Dangers of All Kinds: The Mexican War Letters of Lieutenant Theodore Laidley*, ed. James M. McCaffrey (College Station, TX: University of North Texas Press, 1997), 2; Ulysses S. Grant, *Personal Memoirs*, ed. Caleb Carr (Westminster, MD: Random House, 1999), 57. Furthermore, Grant observed staff work being the equivalent of a special duty assignment.

[31] Michael Ballard, *Pemberton* (Jackson, MS: University Press of Mississippi, 1991), 52-55.

[32] K. Jack Bauer, *The Mexican War, 1846-1848* (Lincoln, NE: Bison Books, 1993), 84.

would be at a specific location in time and what requirements they needed. Army doctrine included request forms, not how to plan in time and space. Despite such difficulties, Taylor's staff adapted while representing the first functioning major field army staff in the American Army. Moreover, the staff won the Battles of Palo Alto and Monterrey, indicating that their methods were working. For the next campaign, the American field staff for Winfield Scott now had a point of reference.

As the war progressed, so did the staff size, structure, and level of proficiency. In the 1848 Mexico City campaign, General Scott formed a staff of approximately 28 officers.[33] The staff sections included the operational staff, engineer corps, ordinance department, topographical engineer, quartermaster department, substance department, pay department, and medical department.[34] The addition of an operational staff consisted of functions not covered by the bureaus including intelligence gathering and information management. Next, a subordinate division had eight total officers including five personal staff officers, then representatives from the quartermaster, topographical engineer, and a chief surgeon.[35] In both echelons, there was a standardized informal organization for the staff. Therefore, a division staff officer would have a counterpart to communicate with on Scott's staff. Overall, this organization structure allowed Scott to avoid many problems from the Northern Mexico campaign by successfully integrating the operational and bureau staff into a cohesive staff that could forecast and plan.

The Mexico City campaign was a successful use of large unit staffs. To begin, Major General Gideon Pillow, the 3rd Division commander, used his staff lieutenants Zealous Tower and George McClellan to conduct aggressive reconnaissance to find enemy size, disposition, and friendly

[33] Timothy Johnson, *A Gallant Little Army: The Mexico City Campaign* (Lawrence, KS: University of Kansas Press, 2007), 274-290.

[34] Ibid.

[35] Ibid.

avenues of approach.[36] Pillow used his staff to maintain situational awareness and control tempo by using terrain and information to his advantage. On Scott's staff, Captain Robert E. Lee would conduct reconnaissance and repair roads to facilitate movement of artillery.[37] Such instances show where the staff was able to translate the commander's vision into concrete tasks, confirm assumptions supporting the operational approach, and control tempo. In his memoirs, U.S. Grant writes that with a staff, Scott extended his situational awareness as "Scott saw more through the eyes of his staff officers than though his own. His plans were deliberately prepared, and fully expressed in orders."[38] The staff was a component for helping field army and division commanders recognize risk, understand the environment, issue orders, and consequently place the force at a position of relative advantage to the enemy.[39]

The Lessons

The period has three important lessons. First, standardized doctrine and administrative procedures allowed an untrained staff to function. Guidelines provided staff officers with no experience a start point to perform actions. The pre-1848 Army was scattered in company size outposts, so when it was time to form and maneuver divisions even active duty officers possessed no familiarity in how to synchronize large formations. While basic, the regulations provided conceptual instructions on how to begin organizing. Furthermore, doctrine reduced the time required to learn

[36] Ibid.

[37] Ibid, 84-85.

[38] Ulysses S. Grant, *Personal Memoirs*, ed. Caleb Carr (Westminster, MD: Random House, 1999), 139.

[39] "Operational art is how commanders balance risk and opportunity to create and maintain the conditions necessary to seize, retain, and exploit the initiative and gain a position of relative advantage while linking tactical actions to reach a strategic objective." Department of the Army, ADP 3-0*: Unified Land Operations* (Washington, DC: Government Printing Office, 2011), 10.

new skills and provided a lexicon that allowed soldiers from different units to communicate efficiently.

Second, when looking for potential staff members, disciplines with parallels to a staff function can fill shortages. Robert E. Lee was an engineer, but also an excellent scout because his education included an understanding of topography and structural design. Lee provided situational understanding because he could add meaning to his observations in relation to the terrain, enemy, and mission. Using parallel disciplines allows a commander to set the pace and therefore initiative on the battlefield.

Finally, finding the right officer for the staff is important. A key difference between Taylor and Scott was that Scott personally selected officers for the staff while Taylor tasked units to provide officers. Assuming the subordinate units did not give their worst officers to Taylor, this means there are attributes beyond being a good tactical officer that are important in the staff.

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SECTION III: THE SPANISH AMERICAN WAR

Following the American Civil War, the nation faced no major threats except for reconstruction in the south and Indian wars in the western plains. As a result, the Army turned into a constabulary force reduced from a high of 1,034,064 in May 1865 to 54,302 in July 1866.[40] A decade later, the Army saw another reduction, and by 1876, there were 27,442 officers and soldiers scattered across 255 military posts.[41] In the late nineteenth century, this reduction meant there was no requirement for division, corps, or field army staffs due to the decentralized nature of the force. By 1898, America was at war with Spain, and Congress authorized an increase of the regular Army to 65,000 and called for the states to raise 125,000 volunteers.[42] Organizing the expansion would require forming staffs for divisions and corps to generate the force, deploy to an overseas theater of war, and then fight.

Attempting to Reform the Staff Organization

Following the Civil War, the Army officer corps engaged in a substantial debate about reform because the nature or war was increasingly becoming larger in space, faster in time, and lethal to soldiers. Conflicts such as the Franco-Prussian war demonstrated to Americans force structures and organizations required to maneuver large forces and prepare for operational deployments.[43] While protected by two oceans, there was a concern that America could not successfully face a European power. A leading advocate for reform was Emory Upton, who, following a tour of European and Asian armies proposed, among many things, changes in officer development and methods to adapt a

[40] Allan Millett, Peter Maslowski, and William Feis, *For the Common Defense: A Military History of the United States of America from the Revolutionary War through Today, Rev. and expanded*, 218.

[41] Russell F. Weigley, *History of the United States Army*, 267.

[42] Millett, *For the Common Defense: A Military History of the United States of America from the Revolutionary War through Today, Rev. and expanded*, 257.

[43] Weigley, *History of the United States Army*, 266-273.

German style staff system.[44] There was a considerable difference between the European and American staff system in function and conceptual use. To bridge the gap, Upton proposed alternating line and staff officers in duty positions, maintaining personnel reports on officers, and establishing technical schools for both officers and enlisted personnel.[45] In essence, Upton offered a pathway to select, educate, and provide experience for officers in a staff system.

In remarks to the School of Application at Fort Leavenworth, Major General William Tecumseh Sherman concurred. Sherman felt the Germans won the Franco-Prussian War because of superior maps and information.[46] While significant, having good maps and field orders was of no value if there was not a staff capable of understanding them. Upton linked the German management of information and orders with an educated staff.[47] The ability to read maps, synthesize reports from the battlefield, and issue clear instructions could reduce uncertainty but required a trained staff to assist in the process.

Despite reformers offering feasible solutions to training, organizing, and use of the staff, parochial interests would dominate the debate.[48] In addition, even if the United States adapted a German staff system, such an organization would have been impractical for Army missions after the Civil War. Consequently, at the start of the Spanish-American War, the Army had made only slight

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[44] Emory Upton, *Official Reports On the Armies of Japan, China, India, Persia, Italy, Russia, Australia, Germany, France, and England* (London: Griffen & Co, 1878), viii.

[45] Ibid.

[46] William T. Sherman, "Address of General W.T. Sherman to the Officers and Soldiers Composing the School of Application at Fort Leavenworth, Kansas" (Fort Leavenworth, KS, October 25, 1882), 7-8.

[47] Emory Upton, *Official Reports On the Armies of Japan, China, India, Persia, Italy, Russia, Australia, Germany, France, and England*, 219-223.

[48] Millett, *For the Common Defense: A Military History of the United States of America from the Revolutionary War through Today, Rev. and expanded*, 245.

adjustments to the staff organization and use.[49] Nevertheless, while the physical organizational structure did not change, the interrelated discussion of training and doctrine was beginning to progress rapidly.

Staff Doctrine and Officer Education

As commander of the Army from 1869-1883, Major General Sherman initiated a series of educational reforms.[50] Sherman wanted training that could "qualify officers for any duty they may be called upon to perform, or for any position however high in rank that they may aspire in service."[51] Sherman was farsighted because in his wartime experience officers could rise to very high ranks quickly. To implement the vision, the Army restarted the Artillery school in 1868 and established the School of Application for Infantry and Cavalry at Fort Leavenworth.[52] Sherman was committed to infusing a culture of learning and adaptation into the officer corps.

In addition to institutional instruction, the school system would also evolve doctrine by clarifying staff roles, developing estimates, and generating field orders. The progression began in the 1890s when instructors Arthur L. Wagner and Eben Swift published a series of books at Fort Leavenworth used for teaching officers how to plan and communicate.[53] The first book Wagner wrote in 1893 was *The Service of Security and Information*, focused on planning for spies and

[49] Millett, *For the Common Defense: A Military History of the United States of America from the Revolutionary War through Today*, *Rev. and expanded*, 245.

[50] Weigley, *History of the United States Army*, 242.

[51] Ibid., 274.

[52] Ibid., 242.

[53] Todd R. Brereton, *Educating the U.S. Army: Arthur L. Wagner and Reform 1875-1905* (Lincoln, NE: University of Nebraska Press, 2000), 40-41.

reconnaissance to increase battlefield awareness.[54] Wagner's book was a testament on the value of planning and the intellectual skills required for success.

Wagner wrote two more books to include *Organization and Tactics* in 1895 and *Elements of Military Science* in 1898, suggesting that the function of the staff was to concentrate on details so the commander could focus on the main tactical problem.[55] Prior to publication of these books, the American staff primarily filled an administrative role, but Wagner believed the staff should plan. For instance, Wagner wrote there should be a staff and a chief of staff who would provide the commander, "an accurate account of the numbers, position, and condition of the general command."[56] While not entirely different from the 1821 Field Service Regulation, the framing suggested the modern staff should have an active versus a passive role in acquiring information. The staff function changed to provide the commander an accurate description of the operating environment and conduct detailed planning.

Selecting the right staff officers was also important. Wagner wrote that in a time of war, the staff must have, "intelligence, presence of mind, and mental readiness, combined with energy, discretion, tact, and good health."[57] Wagner realized attributes required for a planning staff were different from tactical leadership in the field.

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[54] Arthur L. Wagner, *The Service of Security and Information* (Washington, D.C.: James J. Chapman, 1893), 2-5. Wagner wrote the two kinds of information important in war fighting. First was the environment including geography, topography, and resources in the theater of operations. The second type of information related to the enemy and included strength, composition, position, movements, and the morale of the enemy.

[55] Arthur L. Wagner, *Organization and Tactics* (New York: B. Westerman and Co., 1895), 26.

[56] Arthur L. Wagner, *Elements of Military Science* (Kansas City, KS: Hudson-Kimberly Publishing Company, 1898), 18.

[57] Arthur L. Wagner, *Organization and Tactics*, 27.

Alongside Wagner, Eben Swift made further changes in staff training and planning. First, Swift introduced the applicatory method of tactical instruction where students conducted problem solving in lieu of lectures.[58] This idea was different because it forced the student to learn through thinking, not just memorizing textbooks. In general, the exercises required officers to study a map, estimate the situation, make a decision, then write an order.[59] Furthermore, these problems were not always tactical and focused on several echelons of command. For instance, an 1896 problem placed the student in charge of 3,240 companies of infantry with cavalry and artillery support.[60] The requirement was to create a task organization and generate a request for engineer, signal, and hospital support.[61] This type of question would force an officer to understand detailed planning required in a field army. The next requirement for the same problem was to propose a staff composition to support the operation.[62] Through the application method, the instruction allowed officers to think about possibilities for organizing a staff to meet the needs of a mission, not to just blindly follow regulations that did not fit the context of the environment.

Swift's second contribution was in the development of field orders. Using German doctrine, Swift created a five-paragraph field order with the idea that each paragraph represented an important aspect to address when formulating a plan.[63] Message formats existed in various manifestations prior

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[58] Timothy K. Nenninger, *The Leavenworth Schools and the Old Army: Education, Professionalism, and the Officer Corps of the United States Army, 1881-1918,* (Westport, CT: Greenwood Press, 1978), 45.

[59] Ibid., 46.

[60] H.S. Hawkins, "1896 Annual Report," in *Annual Reports of the U.S. Infantry and Cavalry School: For the Years 1882 to 1891, Inclusive.*, ed. Department of the Army (Fort Leavenworth, KS: Staff College Press, 1907), 34.

[61] Ibid.

[62] Ibid.

[63] Nenninger, *The Leavenworth Schools and the Old Army: Education, Professionalism, and the Officer Corps of the United States Army, 1881-1918*, 46.

to the 1890s, but for the first time there was one standard format, taught at one school, focused on both on formulating and communicating the plan. Although not officially adapted by the Army in time for the Spanish-American War, field orders were part of the Fort Leavenworth curriculum in 1894.[64] As the Army expanded in 1898, officers now had a reference for figuring out what was important, how to conduct analysis, and a way to communicate efficiently.

Expansion for War

On 15 February 1898, the Spanish-American War commenced, and President William McKinley proposed a limited war strategy based on Spain conceding to Cuban independence.[65] Meanwhile, the American regular Army was a small constabulary force and required expansion to obtain any strategic objective as an expeditionary force. Therefore, congress authorized a regular Army expansion to 65,000 regular forces and a call for 125,000 volunteers.[66]

As division and corps staffs formed, commanders were at their own discretion to ensure their staff was ready for war. In Camp Thomas Florida, Sixth Corps commander Major General James Wilson Harrison assumed a staff of 11 regular Army officers and 11 volunteers.[67] The overwhelming majority of the staff had very little experience. The volunteers were previously full time civilians and the most active duty officers had never been on a staff.[68] Realizing the need for staff education, Harrison initiated a training school for corps and potential division staffers taught by officers who

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[64] Ibid.

[65] Allan Millett, *For the Common Defense: A Military History of the United States of America from the Revolutionary War through Today*, Rev. *and expanded*, 254-255.

[66] Ibid., 257.

[67] James Wilson Harrison, *Under the Old Flag: Recollections of Military Operations in the War for the Union, the Spanish War, the Boxer Rebellion, Ect*. (New York: D. Appleton and Company, 1912), 418.

[68] Ibid.

attended training at Fort Leavenworth under Wagner and Swift.[69] Unlike previous wars, institutionally educated officers armed with doctrine could transfer knowledge at any time and any place.

The Sixth Corps training plan worked because it tailored a staff that helped Harrison describe, visualize and direct his forces during the Cuban campaign. In combat, MG Harrison judiciously used his staff to collect and analyze information on the operational environment though reconnaissance planning and intelligence estimates.[70] Moreover, the staff training proved particularly useful during the transition from major combat operations to stability operations. For instance, following the Spanish surrender Harrison's corps became the department command of Matznza and Santa Clara.[71] The Sixth Corps staff proved to be the key agent in enabling a smooth transition because they made accurate assessments of key leaders and the social environment, and they made recommendations on the employment of force.[72] Using a trained staff allowed Harrison to anticipate the moves of the opposition, mitigate the effects of the environment, and focus on governing the population.

The experience of the Fifth Corps would prove to be very different. Unlike Sixth Corps that only had to focus on the staff, the Fifth Corps commander General William Shafter was responsible for all troops in and en route to Florida.[73] This created a complicated staff situation that included theater force generation and forming a corps staff. Shafter was obligated to coordinate theater

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[69] Harrison, *Under the Old Flag: Recollections of Military Operations in the War for the Union, the Spanish War, the Boxer Rebellion, Ect.*, 22.

[70] Ibid., 482.

[71] Ibid.

[72] Ibid.

[73] John D. Miley, *In Cuba with Shafter* (New York: Charles Scribner's Sons, 1899), 2-3.

logistics, begin preparing for deployment, and conduct mission planning. Issues ranged from transportation network planning to field sanitation preventing typhoid.[74]

The Fifth Corps staff focused entirely on administrative tasks, which were numerous and poorly synchronized. For instance, the corps deployment plan simultaneously loaded weapons, ammo, and equipment from a base camp of 20,000 soldiers on a single rail track line in one day to move to the port.[75] The deployment plan was impossible to execute and would have taken several days if properly sequenced. This example was not isolated inside Fifth Corps and was a common occurrence. While there was no indication of any type of staff training, which might have helped synchronization, exasperating the problem was lack of doctrine. The bulk of the planning errors were in areas where doctrine did not exist. In lieu of training, if doctrine or regulations were present a new staff was still able to overcome inexperience.

During expansion, Fifth Corps did have some successes. The corps chief engineer and chief of reconnaissance, Colonel George M. Derby, used a cell of six staff officers, most of whom were Fort Leavenworth Infantry and Cavalry School graduates, as the intelligence section.[76] While deployed, Derby assembled patrols for reconnaissance, developed Cuban source operations, and used spies to build information.[77] While such an intelligence section had never existed before, surely Arthur Wagner's *The Service of Security and Information* would have guided the functions. In context, a corps staff officer identified a new requirement and built an organization to fill the gap based on common principles.

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[74] Russell F. Weigley, *History of the United States Army*, 303-305.

[75] Graham Cosmas, *An Army for Empire: The United States Army in the Spanish-American War* (Columbia, MO: University of Missouri Press, 1971), 195.

[76] Ibid., 189.

[77] Ibid.

Meanwhile, the task of generating the staff had other points of friction with rapid movement of commanders and staff officers. The Seventh Corps at Camp Cuba Libre in Jacksonville, Florida formed and organized six brigades into three divisions from scratch.[78] To add more complexity, the corps also formed with a revolving door of personnel. Between May and June 1898, there were six division changes of command and numerous staff changes.[79] Despite personnel turbulence, successful corps commanders such as MG Fitzhugh Lee did well with active involvement in the placement of staff officers.[80] Finding talent that could move to a division or corps staff was difficult and required persistence from an involved commander.

A further issue was not just in the selection of the primary staff, but also in subordinate technical specialists. While the primary staff officers synchronized, the supporting staff specialized in details. To overcome such issues, sections such as the adjutant general department reported using untrained clerks detailed form volunteer regiments because the replacement process failed to catch up to the pace of deployment.[81] The Army did not have appropriate personnel to meet technical requirements and the system to requisition new staff officers was unresponsive. The solution was to find and train capable individuals.

In contrast to Florida, Army operations in California were more efficient for multiple reasons, but a major contributing factor was the focus on building a quality staff. On 15 May 1898, Major

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[78] Fitzhugh Lee, *Annual Report of Maj. Gen. Fitzhugh Lee, Commanding Seventh Army Corps.: Extracted from the Annual Report of the Secretary of War for 1898, 2:218-223* (Washington, D.C.: U.S. Army Center of Military History, 1898), 218-24, http://www.history.army.mil/documents/spanam/98vII.htm (accessed April 20, 2013).

[79]Ibid.

[80] Cosmas, *An Army for Empire: The United States Army in the Spanish-American War*, 189.

[81] Lee, *Annual Report of Maj. Gen. Fitzhugh Lee, Commanding Seventh Army Corps.: Extracted from the Annual Report of the Secretary of War for 1898,* 218-24.

General Wesley Merritt took command of Eighth Corps forming in San Francisco. [82] Merritt's initial action was to submit a by name list of staff officers so he could first organize his staff, then receive and organize soldiers.[83] This meant the corps staff could form with competent primary staff officers at the top able to train and mentor lower level staffs as they arrived. Merritt realized certain people were better suited for staff operations in corps and divisions.

At the same time in San Francisco, MG Ewell Otis took command of a division independent from Eighth Corps. Taking guidance from Secretary of War Alger literally to "take with you such staff officers and clerical assistance as you may desire" Otis started building a non-traditional staff for the time.[84] For instance the Otis staff, unlike their contemporaries, did quartermaster planning. This was not an official staff function, yet by assigning energetic officers, the division was able to master the Army requisition process and anticipate shortages in lieu of requesting supplies when the unit was short. Thinking outside of the established norms was only possible with a carefully selected group of officers.

The Lessons

Officer education, doctrine, and personnel selection made a large field army staff successful. Institutional training from Fort Leavenworth combined with an ad hoc staff training program produced divisions and corps able to synchronize operations when they arrived in their theater of operation. Institutionally trained officers served as a cadre to volunteer officers and this specific process produced on the job training, mentoring, and adaptable staff officers. Army operations in

[82] Stephen Coats, *Gathering at the Golden Gate: Mobilizing for War in the Philippines, 1898* (Fort Leavenworth, KS: Combat Studies Institute Press, 2006), 73.

[83] Ibid., 73.

[84] Ibid., 74.

Florida show that prioritized staff training facilitated more situational awareness for the commander and better control of subordinate units while deployed.

Doctrine was also a critical component to successful staff formation. The Spanish American War represented the genesis of formal field orders and reconnaissance planning, allowing the staff to capitalize on efficiency. This quasi-doctrine originating from Fort Leavenworth guided the Army at a time when the U.S. Volunteer force heavily outnumbered the regulars. Doctrine provided a base that civilians could reference in regards to tactics, calculations, and logistics planning. Hence, a volunteer might not know exactly what to do, but there was a reference to help. In addition, with common principles, staff training could be the same in California and Florida when internal training occurred.

Finally, getting the right people on the staff was important. Corps and division commanders that carefully picked their staff were able to adapt as the situation changed. In some cases, commanders picked trusted officers, but most of the time commanders looked for hard working and flexible officers. Volunteer officers who were brand new to staff functions could often outshine their regular Army counterparts. Neither regular nor volunteer officer had ever been on a division or higher staff at the start of the war. On a large army staff, there were attributes more important than small unit tactical experience.

SECTION IV: WORLD WAR II

The end of World War I to the beginning of World War II represented a massive demobilization and mobilization for the Army. On 30 June 1919, the Army consisted of 2,608,218 personnel; by1922, congress cut active duty strength to 118,750.[85] This skeleton structure would be in charge of planning the largest expansion in American history. By 1945, the Army would number 8,300,000 soldiers.[86] This greatly expanded Army required dozens of new division and corps staffs.

In terms of units, there were only eight divisions fully capable for deployment in 1942, but this number would expand to 89 by the end of the war.[87] Building 81 divisions required multiple activations each year. For instance, 1942 saw 38 division activations, or about three per month.[88] At the next echelon, the Army needed corps to expand to maneuver these new divisions. Over 22 corps were formed during World War II for use around the world.[89] Consequently, when staffing corps and divisions it was numerically impossible to fill units with trained regular officers.

The Changing Role of Staff Doctrine in the Interwar Years

Following the end of the Spanish-American War, staff doctrine significantly evolved. To begin, Eben Swift's model for the five-paragraph order expanded beyond the officers attending Fort Leavenworth and became Army doctrine. The 1907 Army manual *Field Orders* codified the details

[85] Weigley, *History of the United States Army,* 396, 400-401.

[86] Robert Palmer, William Keast, and Bell Wiley, *The Army Ground Forces: The Procurement and Training of Ground Combat Troops* (Washington, D.C.: Department of the Army, 1948), 91.

[87] Weigley, *History of the United States Army,* 436.

[88] Palmer, *The Army Ground Forces: The Procurement and Training of Ground Combat Troops,* 492.

[89] Robert Berlin, "United States Army World War II Corps Commanders: A Composite Biography," *Journal of Military History* 53, no. 2 (Apr. 1989): 147-68, 149.

of the five-paragraph order and included planning considerations for different types of operations.[90] The idea of formal analysis, planning, and orders was no longer a best practice, but now formal principles. Next, by 1917 the Army published the *Staff Manual* specifying staff sizes for armies, corps, divisions, and brigades in addition to outlining general roles and responsibilities of staff officers.[91] This represented the most detailed doctrine on staff operations and was a major evolution from 1898. The doctrine continued to evolve, as evidenced in the 1935 *Check List for Staff Officers Field Manual.* This publication took the elements of the 1917 manual and added checklists by staff function describing specific responsibilities for tactical actions.[92] While prescriptive in nature, the doctrine provided techniques to guide officers in how a staff operates.

After decades of development, World War II began with the first comprehensive document integrating the functions of staffs, the usefulness of staff planning, and the orders process. In 1940, the War Department published the FM 101-5 *Staff Officers Field Manual: The Staff and Combat Orders.*[93] The new manual provided substantially more detail on staff functions and the orders process than previous publications and integrated the information in one publication. The 1940 FM 101-5 provided specific instructions on developing field orders, planning, and even provided standardized forms for reports.[94] Like earlier doctrine, there were checklists by type of operation to ensure the staff considered important elements or a specific mission. For example, in an attack order,

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[90] Department of the Army, *Field Orders* (Fort Leavenworth, KS: Staff College Press, 1907), 6-7.

[91] Department of the Army, *Staff Manual* (Washington, D.C.: Government Printing Office, 1917), 9-16. Furthermore, section 25 says a staff officer, "although a servant, he must have the resolution of a master," 20.

[92] Department of the Army, *Check List for Staff Officers Field Manual* (Fort Leavenworth, KS: The Command and General Staff School Press, 1935), 1-36.

[93] Department of the Army, *FM 101-5 Staff Officers Field Manual: The Staff and Combat Orders* (Washington, D.C: Government Printing Office, 1940), 1.

[94] Ibid, 36.

the checklist ensures staff officers considered objectives, the purpose of the operation, and integrating reconnaissance, artillery, antitank units, and aviation.[95] The Army now had a manual with prescriptive solutions that a relatively inexperienced civilian could reference and understand what to do next.

Manning Corps and Divisions

Finding qualified staff officers at the start of World War II was difficult, but at least there was a system. At the end of World War I, Congress authorized maintaining a pool of officers through the Reserve Officer Training Corps and Officer Reserve Corps.[96] This provided a source of future officers familiar with military operations. Overall, the system generated approximately 106,000 officers available for integration in the Army and served as a major source of field grade officers during World War II.[97] To show the scope of the expansion, by 1943 civilians turned into officers outnumbered active duty officers from 1940 by 40:1.[98] Consequently, the officer reserve system was an important tool for integrating new civilians into the Army.

Another source of officers was finding civilian equivalent skills that could translate into staff expertise. Many civilian management roles quickly transferred to field grade skills in logistics and like-service branches.[99] Better yet, these support branches needed more officers than combat arms. Combat arms required 54 officers per 1,000 soldiers on average, while service support needed 97

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[95] Ibid., 54. The list is far more comprehensive on specific elements to consider.

[96] Weigley, *History of the United States Army*, 401.

[97] Ibid., 428.

[98] Palmer, *Procurement and Training of Ground Combat Troops*, 91-92. In 1940, there were 15,000 active duty officers.

[99] William Keast, *The Procurement and Branch Distribution of Officers* (Washington, D.C.: U.S. Government Printing Office, 1946), 1.

officers per 1,000 soldiers.[100] The support branches needed almost twice the quantity of officers, but had a supply available with civilians transitioning quickly into administrative and logistics roles.

Organization

The job of expanding the Army and figuring out how to make more staffs fell on the Ground Headquarters (GHQ) commander General Lesley McNair, who developed multiple methods to deal with the problem. McNair believed, "higher staffs tended to absorb large numbers of the most experienced staff officers" and consequently the bigger a staff in a corps, the less experience a division would have.[101] The idea was a large field army staff commander would naturally look for the best talent leaving little remaining for subordinate units. Divisions needed talent too.

Furthermore, McNair argued, "a lack of staff training and fitness cannot be compensated for by increasing size."[102] Therefore, the guiding philosophy during World War II was to have the smallest staff possible and streamline where feasible. For instance, McNair thought positions such as the division artillery commander should also function as the division artillery planner.[103] The streamlining process was advantageous not just for numbers, but because World War II also saw an increase in new equipment requiring subject matter experts for employment and planning. A tank destroyer officer would know best how to employ that type of unit and could provide staff support when attached to the division.[104] With advances in many types of equipment technology, a large unit staff would pick up a new unit and the planner to assist.

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[100] Keast, *The Procurement and Branch Distribution of Officers,* 1.

[101] Kent Greenfield, Robert Palmer, and Bell Wiley, *The Army Ground Forces: The Organization of Ground Combat Troops* (Washington, DC: Historical Division, Department of the Army, 1947), 358.

[102] Ibid., 377.

[103] Ibid., 360.

[104] Ibid.

The streamlining also took place in other areas, such as logistics and administration, where jobs became repetitive with expansion at different echelons.[105] A staff could combine and centralize similar functions and maximize economies of scale where possible. McNair also developed a series of standard operating procedures to make staff work easier and faster.[106] Mass mobilization would create an entire Army unfamiliar with their new jobs, and prescriptive documents helped gain experience.

Officer Education

Following the conclusion of World War I, General John J. Pershing found the staff to be a critical component for success and took away another lesson that formalized schooling was the fastest way to prepare a mobilizing army for specialized positions.[107] In concurrence, Hunter Liggett, the I Corps commander during World War I, wrote that the Army was better than any time before, "because there was a small corps of officers trained in theory to high command and staff duties."[108] Officers in the Army recognized the positive effect of changes to training and doctrine. These changes produced officers better able to transition into higher-level command and staff positions. Consequently, the experience gained translated into an updated educational system that would prepare the Army staff for World War II. Omar Bradley remarked that the major change in the Army after World War I was in the school system.[109] The Army saw benefits from formal staff training out of Fort Leavenworth during combat in France, and officers embraced the need for understanding how to

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[105] Ibid.

[106] Ibid., 378.

[107] Harry P. Ball, *Of Responsible Command: A History of the U.S. Army War College* (Carlisle Barracks, PA: Alumni Association of the U.S. Army War College, 1984), 149.

[108] Hunter Liggett, *A.E.F.: Ten Years Ago in France* (New York: Dodd, Mead, and Company, 1928), 283.

[109] Edward M. Coffman, *The Regulars: The American Army, 1898-1941* (Cambridge, MA: Belknap Press of Harvard University Press, 2007), 280.

maneuver large formations. Therefore, the concept was to teach division and corps operations at the Command and General Staff College in Fort Leavenworth and focus on Army level and higher formations at the War College in Carlisle Barracks.[110] A staff education system would teach officers the nuances of planning for formations that would not exist during peacetime to ensure a cadre of officers who understand how to fight in the future.

Army leaders realized there was value in education but varied in opinion on the best method. School training was expensive and produced no tangible results for today.[111] Corps and field army formations did not exist in peace, so training was taking place for a war that might never occur. Hence, while valuable, there was a tension between the quantities of time an officer should spend in instructional training versus unit based training.[112] In an era where Army personnel numbers were shrinking, the cost of schooling might be at the expense of filling line positions.

The issue of institutional school training and serving on the line continued to be a problem during World War II mobilization. At the start of war, the Army found it was simple to produce junior officers on a tight timetable, but qualified field grade officers were considerably more complicated.[113] Field grade officers from the Reserve Officers Corps, the major source of such officers, generally did not attend Command and General Staff College (CGSC) nor had they ever received any other type of training on operational planning and staff work.[114] Officers usually had

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[110] George S. Pappas, *Prudens Futuri: The US Army War College 1901-1967* (Carlisle Barracks, PA: Walsworth Publishing Company, 1967), 90.

[111] Harry P. Ball, *Of Responsible Command: A History of the U.S. Army War College*, 168-169.

[112] Robert Palmer, William Keast, and Bell Wiley, *The Army Ground Forces: The Procurement and Training of Ground Combat Troops* (Washington, D.C.: Department of the Army, 1948), 247.

[113] Ibid., 466.

[114] Ibid., 262, 466-467.

experience in battalion and below operations, but needed development to be proficient on a division or higher staff.

To increase the number of trained officers, CGSC at Fort Leavenworth changed their curriculum. On 30 November 1940, the school launched the first shortened ten-week long staff officer course focused on staff operations specific to the officer's next assignment.[115] This allowed an officer, especially from the Officer Reserve Corps, with little experience in divisions or corps to learn the fundamentals of their position. The nuances on how the course was taught changed during the lifetime of the program, but the core idea was constant: instruct future staff officers.

A mass expansion in institutional training was a useful concept that presented difficulties, most prevalently the quality of instructors. National Guard and reserve officers brought in to teach the course lacked experience, and some instructors had never graduated from CGSC.[116] Even if an instructor had graduated, changes in doctrine and organization during the 1920s to 1930s provided an instructor a different experience from what a student in 1941 was going to have. A second issue was with the scope of training because the post-1940 course only focused on the job the staff officer was going to next in contrast to pre-1940 graduates trained to fill a variety of positions.[117] To illustrate, after selection to be a G-1 an officer learned only the G-1 position in post-1940 CGSC with no training on the nuances of any other staff position. The choice for the shortened course represented risk in exchange for faster utilization of the student in the force. This compromise also made it difficult to move officers into different staff positions.

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[115] Peter J. Schifferle, *America's School for War: Fort Leavenworth, Officer Education, and Victory in World War II* (Lawrence, KS: University of Kansas Press, 2010), 150-151.

[116] Ibid., 162.

[117] Ibid., 164.

Another outcome of the CGSC training was selection of officers to attend the course. In January 1943, Lieutenant General Joseph McNarney conducted an investigation determining only quality officers should attend CGSC due to a high failure rate for officers in attendance.[118] Credentials such as previous schooling or assignments provided base foundations for success, but intangible attributes such as motivation and integrity were essential. A 1946 analysis by William Yeast augments this conclusion, arguing that during World War II selecting the right officer was more important than the actual training an officer received.[119] A poor recruit would continue performing poorly even when given excellent training. The selection process was a critical component for finding officers with the right temperament, intellect, and initiative to work on higher-level staffs.

The next layer of training included the Army War College, which focused on different concepts in comparison to the Command and General Staff College. The War College began in 1904 and was responsible for oversight and direction over the service schools across the Army and contingency planning for the General Staff.[120] In this capacity, the college provided support for real world planning and leadership for the growing Army school system. Prior to World War I, there were 34 different schools conducting branch specific training at multiple locations across the United States.[121] As the Army training manager and future planning institution, the War College was in an excellent position to provide training guidance to specific branches on problems that might exist in the next war. Still, with multiple missions, the War College's real purpose was to function as a

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[118] Ibid., 154.

[119] William Keast, *The Procurement and Branch Distribution of Officers*, 35. The discussion was in context of Officer Candidate School selection; however, the parameters and conclusions were identical.

[120] Harry P. Ball, *Of Responsible Command: A History of the U.S. Army War College*, 87.

[121] Hunter Liggett, *A.E.F.: Ten Years Ago in France*, 285.

graduate level education for a professional officer corps."[122] Leaders in the Army recognized the complexity of war and the value of educating an elite group of practitioners to overcome strategic and tactical problems.

From the beginning, the War College adapted a joint approach. Starting with the first class and going until World War I, each training group included three naval officers.[123] Cuba, the Philippines, and even Mexico City provided proof that the Army could not fight in isolation. Next, in 1904, the Army and Navy agreed to train on the same problems at their service schools so each service could look at distinctive parts of real world issues and find workable solutions.[124] The benefit to such a program is that it allowed integrated, in-depth analysis of specific problems in support of War Department planning.

The experience of World War I changed the War College. In 1917, The United States was able to draft people to generate a large force, but required help from other countries to transport troops, produce wartime equipment, and conduct training.[125] This failure for the United States to access strategic depth and translate that into military force required a solution. Consequently, the War College changed their focus to support national mobilization and maneuvering large forces. The major change from pre-World War I was that the school evolved from only application to a more academic atmosphere focused on problem solving and integration of logistics and resources.[126] This

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[122] Hunter Liggett, *A.E.F.: Ten Years Ago in France*, 283.

[123] Ibid., 288-289.

[124] Henry G. Gole, *The Road to Rainbow: Army Planning for Global War, 1934-1940* (Annapolis, MD: Naval Institute Press, 2003), 20.

[125]George S. Pappas, *Prudens Futuri: The US Army War College 1901-1967* (Carlisle Barracks, PA: Walsworth Publishing Company, 1967), 130.

[126] Ibid., 92-93.

change in curriculum represented belief that officer education was a valuable tool that could overcome obstacles at every echelon.

In some ways, the War College training approach mirrored a university more than a military institution. In addition to fighting subjects, the school included guest speakers from civilian industry, journalists, and academia.[127] If officers were to conduct large-scale war planning again, it was important to understand the national environment and different perspectives. The Army wanted officers capable of developing creative individual solutions, not just soldiers proficient at reciting doctrine.[128] Generating options was more important than finding one correct prescriptive solution.

The War College also started studying conceptual planning. Training started with understanding the nature of the environment and then determining the threat by examining factors to include military, economic, political, social, and geographic.[129] While students did not produce a modern problem statement, they did attempt to understand how variables in war are interrelated when linking strategy to tactical operations. Only after a thorough understanding of the environment did the students create a plan.[130] While not explicit, the War College was teaching how detailed and conceptual planning coexists. This is important because majors attending the course in the 1920s and 1930s would be general officers in World War II maneuvering divisions, corps, and armies.[131] It was no accident that the Army in World War II was able to maneuver army groups.

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[127] Henry G. Gole, *The Road to Rainbow: Army Planning for Global War, 1934-1940*, 18.

[128] Ibid.

[129] Ibid., 92-93.

[130] Ibid.

[131] Michael R. Matheny, *Carrying the War to the Enemy: American Operational Art to 1945* (Norman: University of Oklahoma Press, 2011), xv-xiii.

Next, the school included more than just active officers. Until funding became an issue in 1934, civilians holding reserve commissions and National Guard officers attended the War College.[132] The dual benefit was deeper understanding of other cultures and a larger pool of future officers. Including officers from the total Army and not just the active force allowed officers to share their varied experiences and new ideas on how to solve problems. During mobilization, an active duty officer with this broader perspective would have a better understanding of how to mobilize and employ different components of the Army. Additionally, expanding who could attend the War College meant during World War II activations there was a pool of officers ready for recall who could work on Army or higher staffs.

The War College also continued the tradition of joint operations. Following World War I, the Army initiated an exchange program so Army officers could also learn naval operations.[133] Army leaders did not forget they could not be successful fighting alone, and likely wars would take place overseas. The result of the War College was that 600 of 1000 World War II generals were graduates of the War College, including Army officers such as Dwight Eisenhower, Omar Bradley, and George Patton, and naval officers such as Chester Nimitz and William Halsey.[134] Hence, while no joint doctrine existed during World War II, key leaders were highly familiar with each other and how each service would fight.

In addition to individual institutional training, a final set of collective staff training took place during the activation of the unit. When the War Department selected a division commander, he was able to choose the division's primary staff officers in coordination with the branch.[135] This allowed

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[132] George S. Pappas, *Prudens Futuri: The US Army War College 1901-1967*, 130.

[133] Ibid., 115.

[134] Ibid., 136-137.

[135] Palmer, *Procurement and Training of Ground Combat Troops*, 435-436.

the commander to fill the primary staff with the right people. Next, following the selections the commander and staff attended a four-week course at Fort Leavenworth focusing mainly on staff exercises.[136] There, the staff had an opportunity to work though issues together prior to building the force.

In contrast to a division, corps training was slightly different in that corps had no organic units and, therefore, no requirement to train subordinates. When the corps staff formed, they trained for two months under the direct supervision of an Army commander.[137] This provided flexibility to tailor training and mentoring specific to the commander and staff. The culmination of training was field exercises, such as the Louisiana maneuvers, to allow the staff to work out synchronization and integration.[138] Being a higher-level headquarters, the advantage to the corps staff was using qualified regular army officers in the staff.

The Formation and Activation of Divisions

The 2nd Armored Division activated on 30 June 1940, starting with 99 officers from the 66th Armored Regiment to create a leadership framework for the division expansion to full strength.[139] Using personnel from an existing unit to provide trainers and direction for new units was customary across most of the newly generated divisions. The 1942 activation school had yet to be developed, so selection of staff officers and their training was entirely up to the commander. In 2nd Armored Division (2AD), most of the training took place on field exercises using manuals for references along

[136] Palmer, *Procurement and Training of Ground Combat Troops*, 435-436; Schifferle, *America's School for War: Fort Leavenworth, Officer Education, and Victory in World War II*, 158.

[137] Greenfield, *The Army Ground Forces: The Organization of Ground Combat Troops*, 40.

[138] Ibid., 45.

[139] Donald Houston, *Hell On Wheels: The 2d Armored Division* (San Rafael, CA: Presido Press, 1977), 35.

the way.[140] For instance, in December 1940 the division conducted a road march from Fort Benning to Florida to train on several tasks, including reconnaissance, security, communications, supply, and field maintenance.[141] Operations of this type would force a division staff to synchronize. In addition, despite a lack of institutional staff training, 2AD expansion in 1940 provided the advantage of experienced officers to work in the division staff. This would not be the case for later numbered divisions.

As a staff forms and trains for combat, they face a variety of other problems, such as equipment, supplies, and resourcing the division needs. During the formation of the 2nd Armored Division, the G-4, Lieutenant Colonial Ernest N. Harmon, spent a considerable amount of time coordinating for weapons, uniforms, and organizing new equipment.[142] A further challenge to the training was the newness of tanks and armored divisions. Tanks existed before World War II, but never at a massive scale. The 2AD staff had to figure out how to receive new technology and develop training plans on the new technology while simultaneously building and expanding a staff.

While the 2nd Armored Division represented an example of forming a new unit from active duty units, National Guard units had different challenges. When the 28th Infantry Division from the Pennsylvania National Guard began preparing for war, only 17% of the officers had completed CGSC, and 10 of 15 senior officers had never attended a service school.[143] To remedy the situation, the division commander, Major General Edward Martin, created a plan. The first step was advocating for an active duty Chief of Staff who would be responsible for training subordinates as well as staff

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[140] Ibid., 41-42.

[141] Ibid., 46.

[142] Ibid., 38-39.

[143] Michael E. Weaver, *Guard Wars: the 28th Infantry Division in World War II* (Bloomington, IN: Indiana University Press, 2010), 103, 118.

work.[144] This would inject experience into the division linked with an officer in a position of authority to enforce compliance. The second solution was staff training. The division held internal staff schools and attended maneuvers with regular army divisions to observe current trends.[145] Finally, the 28th conducted staff training concurrent with brigade maneuver training.[146] The 28th could have waited for directed training, but decided to integrate staff training while training subordinate units. Manuals and institutional training set the conditions on how to conduct routines but could not provide the actual analysis. For instance, external field evaluations reported that the division staff was excellent at orders but was unable to integrate operations in the right sequence or place.[147] Applying skills in a field environment was a critical aspect of the division staff learning how to employ operational art.

The 88th Infantry Division (ID) had an entirely different experience from 28th ID or 2AD. The division represented the 49th of 89 divisions to form, comprised primarily of draftees.[148] The 88th lacked the experience the regular Army gave to the 2nd Armored Division or that the National Guard afforded the 28th Infantry Division. At division staff level, the 88th contained a combination of officers from guard, reserves, and regular army, but the staff lacked training or experience in their wartime rank.[149] Staff officers were familiar with the Army, but not with the intricacies of their specific assignments while simultaneously building a new division of draftees from scratch. To fix the problem, the 88th commander, Major General John E. Sloan, directed the division Chief of Staff,

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[144] Ibid., 13.

[145] Ibid., 43.

[146] Ibid., 67.

[147] Ibid.

[148] John Brown, *Draftee Division: The 88th Infantry Division in World War II* (Lexington: The University Press of Kentucky, 1986), 12-17.

[149] Ibid., 37-38.

Wayland Augur, to conduct multiple staff training exercises.[150] An experienced chief of staff with authority to enforce compliance represented an effective method to train and synchronize a staff while supporting real time requirements.

The Lessons

The common patterns from World War II revolve around doctrine, personnel, and officer education. Written doctrine and standard operating procedures helped a staff with no experience figure out what to do next. Although the doctrine was heavy on the use of prescriptive answers and checklists, it was also appropriate to stimulate thinking. Moreover, the doctrine also provided standardization across the Army, allowing personnel to change from one unit to the next with similar systems. Doctrine was a critical aspect for all levels of the staff.

Next, generating new staff officers capable of operating at division level and above was difficult. While mass conscription could deal with generating company level and below officers, there was almost no substitute for the experience required in a staff position. More importantly, an officer might have the right qualifications for staff work, but intangible attributes are just as important in the selection process. The rules established by the Army during World War II often gave commanders discretion to make sure they had the right officers on the staff.

Finally, officer education was invaluable both before and during the war. Before the war, the educational system kept the ideas of mobilizing and maneuvering large formations in the consciousness of the officer corps. During the war, institutional training provided a background for officers to study, while internal field exercises provided opportunities for on the job learning. Following World War II, many generals credited institutional training as the main attribute keeping

[150] Ibid., 37, 25.

the Army afloat during the resource constrained 1930s. Joseph Collins remarked, "It was our schools that saved the Army."[151] While expensive and time consuming, education was important.

[151] Edward M. Coffman, *The Regulars: The American Army, 1898-1941*, 289.

SECTION V: CONCLUSIONS

Despite differences between the operational environments of the three periods studied, mechanisms existed that allowed commanders to build, train, and employ large unit staffs. These include doctrine, officer education, personnel selection, and changes to the organizational structure. Some of these concepts offer relevant implications to the current force should interwar downsizing occur again.

To begin, written doctrine provided a new staff direction, methods, and examples to expedite the learning process. Overall, the staff was both new to the Army or to their wartime role and consequently unfamiliar with staff work at the assigned echelon. Clausewitz wrote that routines, if not absolute or "binding frameworks for action," could provide "the best of general form, short cuts, and options that may be substituted for individual decisions."[152] Similarly, the role of written doctrine aided staff efficiency by providing routines and bridging knowledge gaps to assist with decision-making. In addition, the doctrine provided a common lexicon so a staff knew how to communicate internally and with other staffs. Doctrine reduced friction and inefficiency as long as the staff understood how to adapt to their unique environment. The initial staff work may not have been exemplary, but doctrine provided a baseline reference to support their commander.

Next, staff training was mainly an internal task while the unit concurrently prepared for deployment. While forming, divisions and corps supported generating force activities such as planning for equipment distribution, subordinate training management, and synchronizing movement. With limited external training support, commanders used educated and experienced officers to train the staff between wartime administrative tasks. Faced with constraints and competing demands,

[152] Carl von Clausewitz, *On War*, Indexed Edition., ed. Michael Howard and Peter Paret (Princeton, NJ: Princeton University Press, 1989), 153.

commanders made time and prioritized staff training. While this model worked, it required officers with previous knowledge in staff operations and the ability to design and facilitate training.

The third theme is personnel selection and management. An officer might have the right technical qualifications to serve on a high-level staff, but intangible attributes often determined whether the officer was successful. Instances where a commander personally selected key staff members usually led to a more efficient staff in comparison to selecting officers based on a score or other paper qualifications.

Another part of personnel expansion was matching a new officer with experience in a particular civilian specialty to a similar staff function. While the Army was able to train soldiers and company grade officers quickly, finding officers with enough experience to assist a division or corps commander was a much more daunting task. The solution was finding people with experience that might have some relevance to an existing staff position. In the Mexican-American War, commanders used engineers with terrain survey skills to assist in intelligence and reconnaissance.[153] In the Spanish-American War, civilian train and boat managers assisted Fifth Corps while planning deployment.[154] In World War II, civilian managers quickly integrated into the Army administrative and logistics function.[155] Detailed planning was the major advantage from the outside experience. While the Army could educate officers on active duty in conceptual planning, finding people with proficiency in specific functions proved invaluable, especially when encountering unfamiliar problems. For example, nineteenth century mass boat planning was an infrequent Army requirement and civilians were excellent at the task.

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[153] Specific examples begin with Winfield Scott using Robert E. Lee for ground reconnaissance. Timothy Johnson, *A Gallant Little Army: The Mexico City Campaign*, 84-85.

[154] Graham Cosmas, *An Army for Empire: The United States Army in the Spanish-American War*, 195.

[155] Keast, *The Procurement and Branch Distribution of Officers*, 1.

The final commonality between the wars was changing the organizational structure by streamlining staff functions. As the Army grew, there were benefits similar to an economy of scale as expansion led to many redundant staff positions between multiple echelons. Limited use or specialized requirements and functions could be more effective in servicing a large formation. The specific organizational changes were unique to the period, but the trend was cutting waste and consolidating to allow filling personnel positions elsewhere.

Implications for the Force

Using the past as a pattern for mass mobilization and expansion, three implications arise to include doctrine, officer education, and personnel selection. In context, mass mobilization is not the modest increase of the Army size during conflict in Iraq and Afghanistan, but the substantial increases represented during the Mexican American War, Spanish American War, and World War II. In addition, the modern staff is very different from the nineteenth century in composition and function. Still, intelligent commanders such as Scott and Otis developed basic staff structures that in practice were very similar to interactions that take place today.

Staff growth follows a few general trends meaning the Army can prepare future staffs now for whatever size expansion occurs. During expansion, staffs will grow with inexperienced officers who are either new to the Army or to their position. Training will take place on the job and while more experienced officers can enable development, the veterans will likewise work in unfamiliar roles. Moreover, as a headquarters staff prepares for deployment there will also be large numbers of administrative, unit training, and logistics tasks to execute. Assuming this process remains constant, the challenge becomes how to accelerate a staff's proficiency in aiding a commander practicing operational art. Many solutions are difficult because they are not feasible or suitable, especially in the case of personnel. For instance, maintaining a large reserve officer corps with previous combat and staff experience would be desirable, but it is not practical in an environment of budgetary constraints.

Despite such limitations, the Army can still position itself in an advantageous situation though doctrine, training, and personnel selection.

The first tool is Army doctrine, which must remain clear, concise, and readable to amateur staff officers, civilians, and non-professionals. The assumption is either officers will operate above their peacetime roles or civilians will be joining the staff. Excessive use of jargon or abstract ideas hinders new learning, especially while on the job with deployment related distractions. Fortunately, Doctrine 2015 supports this idea with shorter Army Doctrinal Publications (ADPs) augmented by increasingly detailed Army Doctrinal Reference Publications (ADRPs) and Field Manuals (FMs). The Doctrine 2015 concept allows individuals unfamiliar with another role the ability to choose how deep to study another subject. Hence, if training only one staff function takes place as it did in World War II, the staff officer could start with an ADP and have guideposts to understand where to go next. During the Mexican American War, there was only one primary regulation for everything. Today, hundreds of publications exist that are only useful if the methodology to find information is logical.

The next portion of doctrine includes Tactics, Techniques, and Procedures (TTPs) that support on the job learning. The Army must maintain a repository of standard operating procedures for divisions and corps staffs to include planning tools, methods, and message formats. From the Mexican American War to World War II officers used examples to substitute for experience. While there is a danger that a TTP might not be relevant to a situation, adaptive staffs at least have a starting point to accelerate their learning.

The second tool is training, because in every instance of wartime expansion, existing officers trained new staffs in the field while performing and learning their own job. Consequently, interwar officers with training in staff functions must not only demonstrate proficiency in knowledge, but also in instruction. Therefore, the first step begins with training existing officers in all components of the Army on staff functions and operational art at division level and above. The second step is ensuring officers maintain experience in teaching and coaching. For instance, assigning officers as instructors

to Training and Doctrine Command is not just beneficial to the Army for the present, but will also help the future, as officers are not forced to learn teaching skills while building new staffs.

While officer education today is desirable, the personnel implication is about choice between the operating force and generating force. When the Army is small during interwar years, forces for operational missions generally come at the expense of the generating force. Therefore, the opportunity cost to complete missions today comes at the expense of quickly building a competent staff. As demonstrated by the Spanish American War and World War II, officers who were masters at both training and their doctrine during the interwar periods were able to accelerate the staff learning both in mobilization and in combat.

The final implication is determining screening criteria for recruitment of intangible skill sets relevant to a staff practicing operational art. During the three periods studied, paper qualifications alone did not accurately evaluate the potential performance of an officer for staff training and execution. There was more than just intellectual skill or previous experience. In this instance, turning to civilian industry studies provide a pathway to begin such an analysis. A study by Manuel Velasco researched companies hiring new college graduates. Screening just for high grades failed to find the best employees.[156] Similarly, an Army officer might possess the quantitative qualifications to move to a higher staff such as an exam score or completing a key development position, but this does not always make them the best candidate.

Furthermore, Velasco found "soft skills" such as teamwork, leadership, and communication were far better indicators of potential.[157] In an army staff, related soft skills are critical to the commander's practice of operational art and are cornerstones of the Advanced Military Studies

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[156] Manuel S. Velasco, "More Than Just Good Grades: Candidates' Perceptions About the Skills and Attributes Employers Seek in New Graduate", *Journal of Business Economics and Management* 13, no. 3 (2012): 499-517.

[157] Ibid.

Program curriculum. Velasco found a key component of companies looking for soft skills is they must first create an ideal candidate for a point of reference.[158] Then the company must evaluate previous work experience from the potential candidate and provide an internship to see if the candidate works.[159] Therefore, developing criteria for the ideal staff officer for a division as an initial screening to include leadership, communication, and teamwork abilities would serve as the first cut. The next move would a temporary internship program managed by the Chief of Staff who would determine if the candidate should attend follow on schooling and stay within the staff system or move to a different position.

Conclusion

Three periods of interwar years to include the time following the War of 1812, the American Civil War, and World War I, provide operational planners lessons on the organization and training of corps and division staffs. While each period achieved operating force size reductions in a unique way, when war came they all made similar choices about how to build and train a staff. Furthermore, while developing the staffs there was a common condition where officers simultaneously learned their roles while conducting operational planning to build a unit and prepare for combat operations. The solution to overcome these obstacles included doctrine, officer education, and officer selection. Consequently, it is possible to prepare for the next expansion with doctrine prepared to teach new staff officers, educating officers in operational art and instruction, and building a system designed to screen for officers capable of high performance in an operational staff.

[158] Ibid.
[159] Ibid.

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